



A MITEL
PRODUCT
GUIDE

Unify Phone

Unify Phone V3 for Web

OpenScape Business

User Guide

01/2025

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1 Changes in current issue

Impacted chapters	Change description
Enabling VT headset integration on page 52	New chapter about VT headset integration.

2 Overview

This guide describes how to make use of the Unify Phone web app when working with an OpenScape Business communication system.

The document contains general descriptions of the technical options, which may not always be available in individual cases.

If a particular function on Unify Phone is not available to you as described, this may be due to one of the following reasons:

- The function is not configured for you. Please contact your administrator.
- Your communication system does not feature this function. Please contact your sales partner for information on how to upgrade.

2.1 Unify Phone

Unify Phone is a cloud-based telephony connector working with the OpenScape communication systems:

- Unify OpenScape Voice
- Unify OpenScape 4000
- Unify OpenScape Business

It allows you to make and receive phone calls on your business phone number using the Unify Phone app.

Unify Phone comes in two different flavors:

- Unify Phone for Unify Video: it is used in conjunction with Unify Video allowing Unify Video users to communicate with others via phone calls.
- Unify Phone for OpenScape: it is used as a stand-alone OpenScape communication system telephony client.

With Unify Phone you can easily:

- Make call
- Answer, decline or drop a call
- Send DTMF commands in a call
- Hold and retrieve
- Mute/ Unmute
- Transfer call
- Pull call from other Unify Phone clients or desk phone
- Push call to desk phone
- Push call to alternative number¹
- Make or answer a second call
- Swap calls (alternate)
- Merge two calls into a conference
- Call forwarding
- Alternative number (One Number Service)
- Call routing
- Voicemail
- Remote call control of desk phone (Computer Telephony Integration - CTI): hold and retrieve, end call, swap calls, transfer, merge into conference
- Add phone numbers to favorites

- Access a contact's profile information

Incoming calls and calls that are in progress on your Unify Phone client can be controlled from an OpenScape Business client. Remote control is only available for a single Unify Phone for web or PWA client. This feature is not supported on the Unify Phone mobile clients.

Depending on the UC mode used, the following clients are supported:

- UC Smart: myPortal @work.
- UC Suite: myPortal for desktop, myPortal for outlook, myAttendant, myPortal @work.

NOTICE:

myAgent is currently not supported.

2.2 Prerequisites

Prerequisites for Unify Phone for Unify Video

- You have a Unify Video account.
- You are a subscriber of an OpenScape Business V3 (with a Service Release 2 or higher) communication system.
- Your communication system has been set up to integrate with Unify Video via Unify Phone.
- The necessary licenses have been assigned to you on both Unify Video and OpenScape Business.
- Your Unify Video administrator has enabled cross-launch for you, so you are able to launch:
 - Unify Phone from Unify Video and
 - Unify Video (desktop app only) from Unify Phone.

The Unify Video app and the Unify Phone app are tightly integrated.

- You have both the Unify Video app and the Unify Phone app open on your computer and you have signed in to both of them, so you are able to make and receive phone calls in Unify Video.

Prerequisites for Unify Phone for OpenScape

- You are a subscriber of an OpenScape Business V3 (with a Service Release 2 or higher) communication system.
- Your communication system has been set up to connect to Unify Phone.
- You are a Unify Phone user.
- The necessary licenses have been assigned to you on OpenScape Business.

2.3 Supported platforms and browsers

You can use the Unify Phone web app on Windows, Mac, and Chromebook.

¹ Available when Unify Phone works with Unify OpenScape Voice or Unify OpenScape 4000

Unify Phone web app supports the following browsers:

- Google Chrome (version 88 or newer)
- Microsoft Edge (version 88 or newer)
- Mozilla Firefox (version 78 or newer)
- Safari (version 16 or newer)

2.4 Supported Virtual Desktop Infrastructures

Unify Phone web app supports the following Virtual Desktop Infrastructures (VDI):

- Citrix VDI
- VMware Horizon
- Microsoft Terminal Services via Remote Desktop Connection

When using Unify Phone through a Remote Desktop Connection, the audio and video resources of your local computer must be shared with the remote computer.

Please contact your company administrator for further details, if you remotely access company resources through VDI.

3 Accessing Unify Phone

3.1 Signing in

This section describes how to sign in to:



- Unify Phone for Unify Video
- Unify Phone for OpenScape, with your Unify Phone credentials
- Unify Phone for OpenScape, with Single Sign On (SSO)

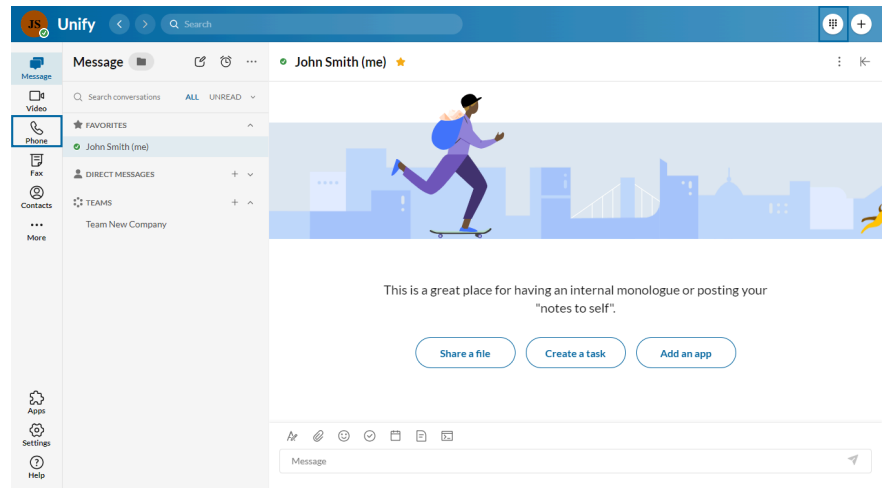
3.1.1 Signing in to Unify Phone for Unify Video

You can sign in to Unify Phone for Unify Video using your Unify Video account credentials.

Step by Step

1) Open Unify Phone with any of the following ways:

- a) Go to the Unify Video app and click  at the top right or  in the left-hand navigation bar.



- b) Open a web browser and enter the address (URL) of the Unify Phone app: <https://phoneapp.unify.com>.
 - c) Open the [Unify Phone PWA](#), if it is installed on your device.
- The Unify Phone app opens prompting you to sign in.



- 2) Click **Sign In**.
- 3) Enter the email address associated with your Unify Video account and click **Next**.
- 4) Enter the email address or phone number associated with your Unify Video account and click **Next**.
- 5) Enter the password and click **Sign In**.
- 6) Click **Authorize** to allow both Unify Phone app and Unify Video to access your account information.

3.1.2 Signing in to Unify Phone for OpenScape with your Unify Phone credentials

When Unify Phone is used as a stand-alone telephony client, you can sign in to the app using your Unify Phone account credentials.

Step by Step

- 1) Open Unify Phone with any of the following ways:
 - a) Open a web browser and enter the address (URL) of the Unify Phone app: <https://phoneapp.unify.com>.
 - b) Open the [Unify Phone PWA](#), if it is installed on your device.The Unify Phone app opens prompting you to sign in.

- 2) Click **Sign In**.
- 3) Enter the email address associated with your account and click **Next**.
- 4) Enter the password associated with your account.

If you can't remember your password, click **Forgot password?**, enter the email address associated with your account, and then click **Reset**. An email with a link to reset your password will be sent to you. For more information, see [Resetting your password](#) on page 13.

If you receive a message stating that your password has expired, follow the instructions sent to you via email to set a new password.

NOTICE: By default, your password is set to expire automatically every 90 days. You will receive an email reminder 7 days prior to your password expiration date. Remember to check your junk or spam folder if you can't find the email in your inbox.

- 5) Click **Sign In**.

3.1.3 Signing in to Unify Phone for OpenScape with Single Sign On (SSO)

Single Sign On Authentication (SSO) allows you to sign in to multiple applications using a single set of credentials. If your administrator has activated SSO for your Unify Phone for OpenScape tenant, you can use your organizational account to sign in to the Unify Phone app.

NOTICE: This option is only available for Unify Phone for OpenScape.

Step by Step

- 1) Open Unify Phone with any of the following ways:
 - a) Open a web browser and enter the address (URL) of the Unify Phone app: <https://phoneapp.unify.com>.
 - b) Open the [Unify Phone PWA](#), if it is installed on your device.The Unify Phone app opens prompting you to sign in.
- 2) Click **Sign in**.

- 3) Enter your email address and click **Next**.
- 4) You are redirected to the SSO provider's sign-in page. Sign in with organizational account credentials.
After successful authentication, you are redirected back to the Unify Phone app.

3.2 Signing out

To sign out at any time:

Step by Step

- 1) Click on your profile picture at the top right of the app.
- 2) Select **Sign out** from the drop-down menu.

3.3 Resetting your password

You can reset your password for Unify Phone for OpenScape if you forget it.

NOTICE: If you sign in to Unify Phone for OpenScape through Single Sign On (SSO) you cannot reset your password by following the steps outlined below; you must reset your password in the third-party service that provides the SSO.

Step by Step

- 1) On the Unify Phone for OpenScape sign in page, click **Forgot password?**.
- 2) Enter the email address associated with your account and click **Reset**.
An email with a link to reset your password will be sent to you.
- 3) Go to your email inbox and open the email with the subject **Reset password** from Unify Phone for OpenScape.

NOTICE: Remember to check your junk or spam folder if you can't find the email in your inbox.

- 4) Click the link in the email.
- 5) Enter your new password in the **New password** field, then enter it again in the **Confirm new password** field.

The password must conform to the password requirements displayed.

As you type in, a visual strength indicator shows how secure your password is.

For security reasons, you cannot reuse a few passwords that you have previously set on your account. If the new password matches a recent password from the password history cache, an error message is displayed prompting you to choose a different password.

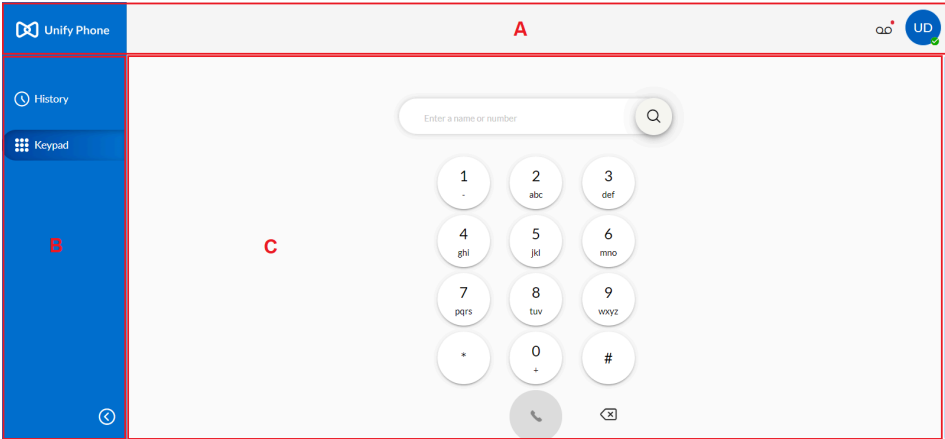
- 6) Click **Submit**.

Your password is reset.

NOTICE: Your password is set to expire automatically every 90 days. You will receive an email reminder 7 days prior to your password expiration date.

3.4 Main interface

The Unify Phone main window consists of three main sections.



Section	Description
A	Header - Displays your profile picture, presence status and features that are enabled for you (e.g. voicemail). When you click on your profile picture, a menu will open with additional options that allow you to access information and settings for your account and client.
B	Left menu - Displays the basic navigation menu for Unify Phone. The following options are available on the left menu: <ul style="list-style-type: none">• Keypad• History
C	Display menu - Displays information related to the option selected in the left menu.

When you open the Unify Phone app, you are navigated automatically to the **Keypad** tab.

The left menu can be displayed in two modes: expanded or collapsed. In expanded mode, the left menu shows the names of the menu items and the icons representing them. In collapsed mode, it shows only the icons representing the menu items.

By default, the left menu is displayed in expanded mode on larger screens and in collapsed mode on smaller screens.

You can collapse or expand the left menu at any time by clicking ⏏ or ⏏ at the bottom left of the menu.

4 Calls

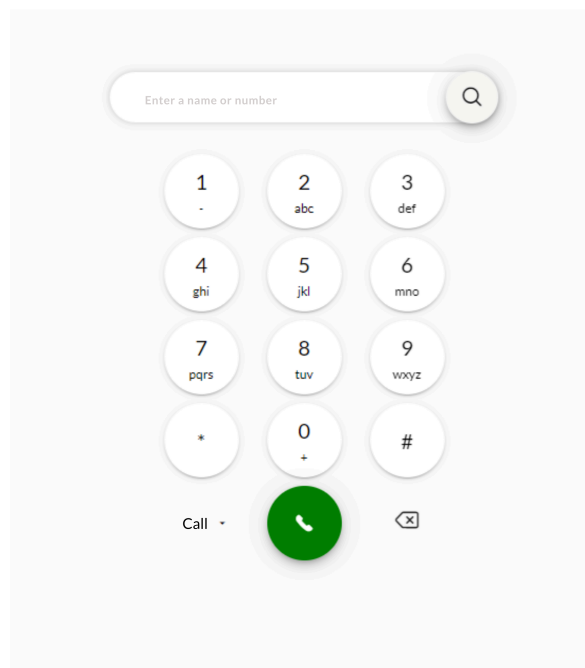
With Unify Phone you can easily make and receive phone calls, view your current calls and manage them as you need.

As an **OpenScape Business subscriber**, you can make or receive up to two calls at a time on Unify Phone, all on the same client (web or mobile). Only one call can be active at a time. Others can be either incoming calls or calls on hold.

You can view all ongoing calls on your work number (incoming, active, or held calls) even if they are in progress on another client or device (remote calls). For example, on your web app you can view calls you are currently handling on your mobile app. Calls can be either all local or all remote.

If a desk phone has been assigned to you on your OpenScape system, you can view and control ongoing calls on your desk phone from within the Unify Phone app.

4.1 Making a call from the keypad



Step by Step

- 1) Open Unify Phone.

You are directed to the **Keypad** tab.

- 2) If a desk phone has been assigned to you on your OpenScape system, you can select the device to make the call from as follows:

- a) Click **Call** ▾ next to the call button and select your preferred option between **Unify Phone** (default) or **Desk phone**.

The selected device will be remembered as the preferred device for calls initiated through the specific Unify Phone client.

Calls

Making a call from the call history



3) Make a call in one of the following two ways:

- a) Use the on-screen keypad to enter a number and click the call button.
- b) Type the name or number you want to call and when you finish typing:
 - Press **Enter** or
 - Select an item from the suggestion list.

For more information, see [Searching for a contact](#) on page 35.

4.2 Making a call from the call history


Step by Step

- 1) Click  **History** on the left menu of the Unify Phone app.
- 2) Hover over the call history entry you are interested in and click  to the right of the entry.

The call is made using the device you last selected in the Keypad area.

4.3 Making a call from favorites

Step by Step

- 1) Click  **Favorites** on the left menu.
- 2) Locate the contact you are interested in and click on it.

The call is made using the device you last selected in the Keypad area.

4.4 Making a call from a contact's profile

Step by Step

- 1) Go to the profile of the contact you want to call in one of the following two ways:
 - Select **Keypad** from the left menu, search for the contact's name or phone number, then click on the contact's profile picture in the search results.
 - Select **History** from the left menu, click on the profile picture of the contact in the call history.
- 2) Click on the phone number of the contact.

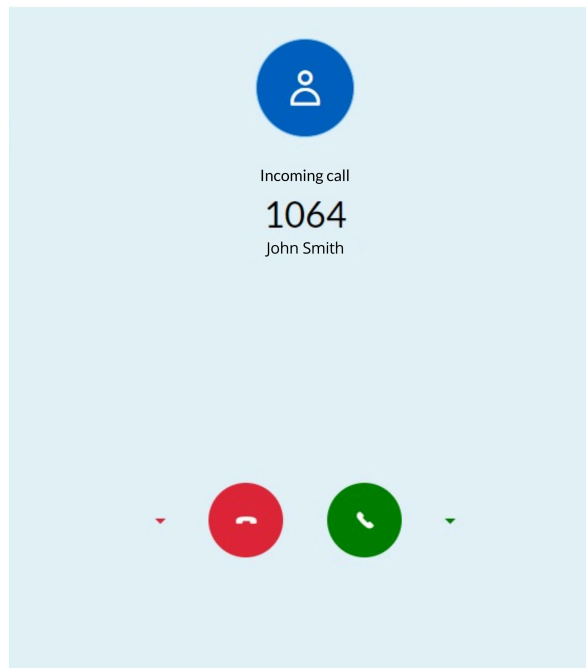
The call is made using the device you last selected in the Keypad area.

4.5 Receiving a call



You can easily receive phone calls through Unify Phone. When a call comes in, you will see the incoming call alert on your display and you will get an audio notification.

You can select to answer or decline the call or send the call to voicemail (if voicemail is enabled for you).

If you have a desk phone or you have set an alternative number in [Settings](#) (e.g. mobile), you will also get the option to answer the call from the respective device.



Procedure

- To answer the call, click .
- To decline the call, click .
- To send the call to voicemail, select **Decline > Voicemail**.
- To answer the call from your desk phone, select **Answer > Desk phone**.
- To answer the call from your alternative phone, select **Answer > Alternative number**.

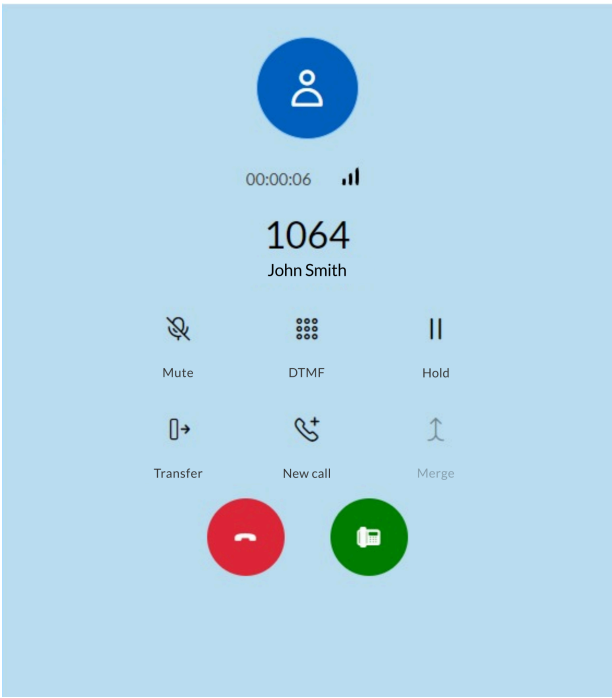
NOTICE:

The **Answer** drop-down list is visible if a desk phone has been assigned to you on your OpenScape system or if you have set an alternative number in Settings.

Only options that are available to you are listed in the **Answer** drop-down.



4.6 Actions during an active call

While on an active call, you can see the name or number of the person you are on a call with on the call screen, the duration of the call, the call metrics and a set of call controls.



The following table summarizes the call controls and their functions.


Icon	Action	Description
	DTMF	Open a keypad to enter DTMF (dual tone multi-frequency) digits
 	Mute / Unmute	Mute or unmute your microphone
 	Hold / Retrieve	Place the call on hold or retrieve the call
	Transfer	Transfer the call to another number
	New call	Make a new separate call ²
	Merge	Merge two parallel calls to bring them into a conference ³
	End call	End the call

Icon	Action	Description
	Push to desk phone	Push the call to desk phone ⁵
	Pull	Pull a remote call ⁶

4.7 Sending DTMF commands on an active call

During an active call, you can send Dual-Tone Multi-Frequency (DTMF) commands.



Step by Step

- 1) Click  **DTMF** on the call controls.
- 2) Use the on-screen keypad or the keyboard to enter DTMF commands.

4.8 Placing a call on hold

While on an active call, you can place the call on hold so that you can perform another task like making or answering another call.

Procedure

- To place a call on hold, click  **Hold** on the call controls.
The other party will be placed on hold until you retrieve or transfer the call.
- To return to the call, click  **Hold** again on the call controls.

4.9 Pushing an ongoing call to desk phone

You can push an active call from the Unify Phone app to your desk phone.


Prerequisites

- A desk phone has been assigned to you on your OpenScape system.
- You are on an ongoing call on the Unify Phone app.

To push the call:

-
- ² Available when you are on a single call
 - ³ Activated when you are on two separate calls
 - ⁴ Available when you are on two separate calls
 - ⁵ Available when a desk phone has been assigned to you on your OpenScape system
 - ⁶ Available when you are on an ongoing call into a remote Unify Phone client or desk phone and you haven't reached the maximum call limit on your web app.

Procedure

- Click  on the call controls.

4.10 Transferring a call



You can transfer an active call to another person with or without consultation.

4.10.1 Transferring a call without consultation (blind transfer)

You can transfer a call to another person without speaking to them first.

While on an active call:

Step by Step

- 1) Click  **Transfer** on the call controls.
- 2) Enter the name or number you want to transfer the call to.
As you type in, a list of suggested contacts is displayed.
- 3) When you finish typing, do one of the following:
 - Press `Enter`.
 - Select a contact from the list.
 - Select **Dial**.
This option is only available when you enter a number.
 - Click  **Transfer**.



The call is transferred and you are disconnected from the call.

4.10.2 Transferring a call with consultation

You can speak with the person you want to transfer the call to before actually transferring the call.


While on an active call:

Step by Step

- 1) Click  **New call** on the call controls.
- 2) Enter the name or number you want to transfer the call to.
As you type in, a list of suggested contacts is displayed.
- 3) When you finish typing, do one of the following:
 - Press `Enter`.
 - Select a contact from the list.
 - Select **Dial**.
This option is only available when you enter a number.
 - Click  **Call**.

- 4) The first call is put automatically on hold so you can talk privately with the third party.

The first call's information appears at the top of the call screen, including the word **Holding** so that you know the call is on hold. The second call appears at the bottom of the call screen and is currently the active call.


- 5) To transfer the call, click  **Transfer** on the call controls.

The call is transferred and you are disconnected.

4.11 Making a second parallel call

You can make a new call, while already in a call.

Step by Step

- 1) Click  **New call** on the call controls.
- 2) Enter the name or number you want to call.
- 3) When you finish typing, do one of the following:
 - Press **Enter**.
 - Select a contact from the list.
 - Select **Dial**.

This option is only available when you enter a number.

- Click  **Call**.

The first call is put automatically on hold and the second one is initiated.

The first call's information appears at the top of the call screen, including the word **Holding** so that you know the call is on hold. The second call appears at the bottom of the call screen.

4.12 Receiving a call during another active call

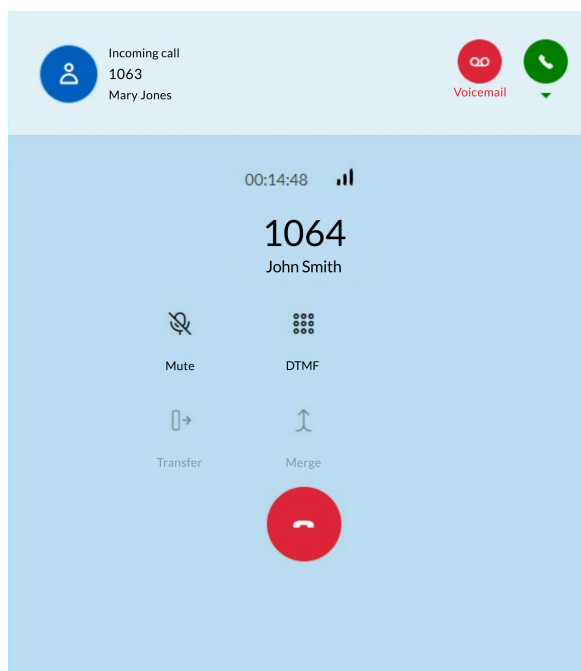
When a call comes in while you are engaged in an active call, you will see the incoming call alert on your display and you will get an audio notification. The call appears at the top of the call screen.

You can select to answer the call or send the call to voicemail (if voicemail is enabled for you).




If you have set an alternative phone in [Settings](#) (e.g. mobile), you will also get the option to answer the call from the respective device.

Calls

Viewing all current calls



Procedure

- To answer the call, click .
- To send the call to voicemail, click .
- To answer the call from your alternative phone:
 - a) Click the down arrow below .
 - b) From the **Answer with** drop-down list that opens, select **Alternative number**.

NOTICE:

The **Answer with** drop-down list is visible if you have set an alternative number in Settings.

When you answer the second call, the first call is put automatically on hold. The first call's information appears at the top of the call screen, including the word *Holding* so that you know the call is on hold. The second call appears at the bottom of the call screen and becomes the active call.

4.13 Viewing all current calls


The call screen displays the list of all active, incoming, or held calls, including calls that are in progress on another device (remote calls).

Each call in the list includes the following information and functions:

- Phone number and name of the caller/ callee
The name is only displayed when it can be resolved (e.g. from contacts)
- Call status (e.g. *Incoming call*, *Holding*) or, in case of an active call on your local client, the call duration

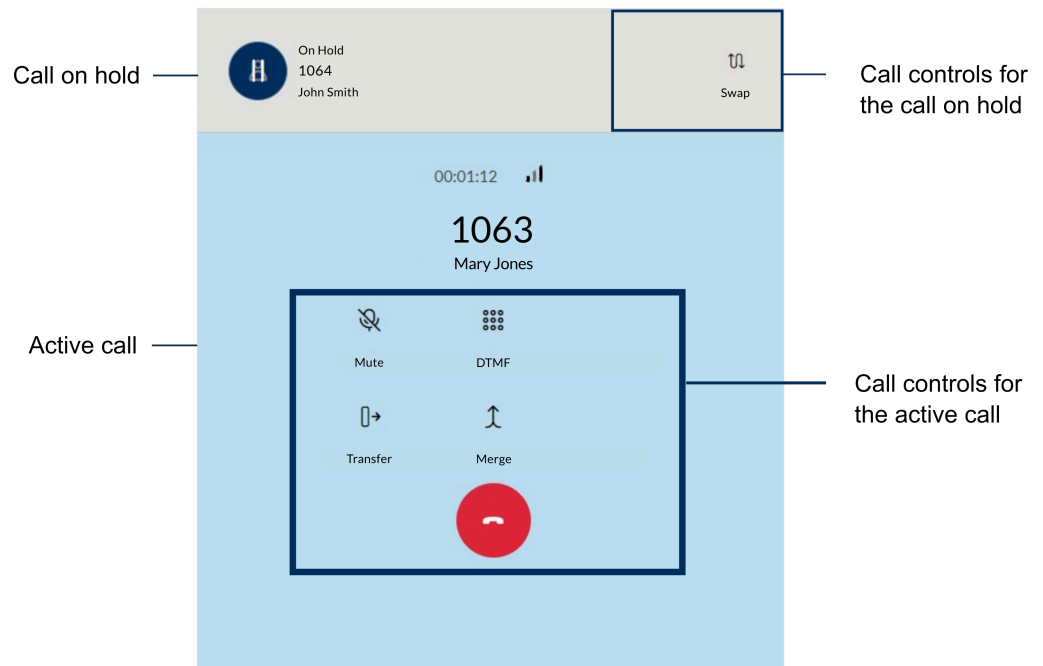
- Call controls

Besides the call controls listed in section [Actions during an active call](#) on page 17, you would also see the following call control:

Icon	Action	Description
	Swap	Swap two separate calls ⁷

Available call controls depend on the status of the calls on your work number and the telephony settings configured for you.

The following figure shows an active call and a call on hold.



4.14 Swapping between two parallel calls

You can swap between an active call and a call on hold. When you do this, the currently active call is placed on hold and the call on hold becomes the active call.

To swap between two parallel calls:

Procedure


- Click  **Swap** on the call controls available for the call on hold.

⁷ Available when you are on two separate calls

4.15 Merging two parallel calls

When you are on two calls at the same time, you can merge them into a conference:

Procedure

- Click  **Merge** on the call controls.

The calls are merged into one under the title **Conference** and you can see the names or numbers of the conference participants on the call screen.

4.16 Pulling an ongoing call from another device

You can move an active call from the device on which you answered the call to another preferred device. For example, you can move the call from your mobile app or desk phone to your web app.

The text `Remote call` is displayed next to the status of the call on all inactive devices on which you signed in.

Prerequisites


- You are on an ongoing call into a remote Unify Phone client or desk phone.

To pull the call on the web app:

Step by Step

- 1) Open the Unify Phone web app.
- 2) Click **Pull** on the call controls.

4.17 Call quality indicator

The call quality indicator  shows the quality of the connection during an active call.

The call quality indicators are described in the following table:

Call quality indicator	Call quality	
Three bars	High	All values are within the expected range.
Two bars	Average	Some values are below the expected range. Sporadic audio issues may happen.
One bar	Low	Several values are below the expected range or packet loss is high. Audio may break during the call.

Call quality indicator	Call quality	
No bars	Poor	Most indicators are below the expected range or packet loss is very high. Audio is likely to be unusable.

When the call quality is low (one bar) or poor (no bars), you can do the following actions:


- If you are using a WiFi connection, move to an area with better network connection, or switch to another network.

If the problem persists, contact your system administrator to troubleshoot the network. Clicking on the bars to show detailed call metrics may help diagnosing the issue.
- If you are using a data (cellular) connection, move to an area with better cellular reception.
- If you are using a wired network connection, contact your system administrator to troubleshoot the network. Clicking on the bars to show detailed call metrics may help diagnosing the issue.

4.17.1 Call metrics

While on an active call, you can check the audio quality of the call using **Call Metrics**.

Call metrics are available after the call is established and for as long as the call is not on hold.


To view call metrics of an active call, click  **Call Metrics** on the call screen, below your avatar. The icon appears as loading for the first few seconds of the call, then a pop-up window with the call metrics appears.

The following call metrics are collected in real time:

- **Jitter** is measured in milliseconds as the variation between packet delays.
- **Send packets lost** is calculated as the percentage of packets that don't make it to the destination party in the call.
- **Receive packets lost** is calculated as the percentage of packets that don't make it from the other party in the call.
- **Round-trip time** is measured in milliseconds as the amount of time it takes for a packet to be sent and for the acknowledgment of the packet to be received.

Unify Phone collects call metrics every two seconds.

Metrics exceeding their threshold are displayed in red.

The call quality indicator  shows the quality of the connection using bars. For more information about call quality indicator, see [Call quality indicator](#) on page 24.

4.18 Remote call control of desk phone

You can manage a call that is currently in progress on your desk phone.

In the call screen, you will see the text `Remote call` displayed next to the status of the call and a set of call controls. Only options that are available to you are displayed.






You can hold/ retrieve the remote call, end the call, transfer the call, swap between two parallel calls on your desk phone or merge into a conference. You can also pull a remote call to your web app.

Prerequisites

- You are on an ongoing call on your desk phone.

1) On your web app, locate the remote call in the call list.

2) Do one of the following:

- Click  **Hold** to hold / retrieve the call.
- Click  to end the call.
- Click  **Transfer** to send the call to another person.
- Click  **Swap** to swap between two calls on your desk phone (e.g. swap between a call on hold and an active call).
- Click  **Merge** to merge parallel calls on your desk phone to bring them into conference.
- Click **Pull** to retrieve the call into your web app.

4.19 Name resolution of phone numbers

Unify Phone searches for users or contacts by their phone number and attempts to add naming information to them. This action is referred here as name resolution.

A phone number can be resolved to a name only if it is associated with only one user. It is required that your communication system has been configured to send Fully Qualified Numbers to Unify Phone.

Any name resolution attempt is done first on Unify Phone users. If the number cannot be resolved, your Unify Phone app will attempt to resolve the name through external services. If 2 (or more) external services are connected and they both resolve to a name, there is no specific priority which name will be used.

Name resolution of Unify Phone users

When resolving a phone number displayed on a Unify Phone client, Unify Phone searches the phone numbers of all Unify Phone users that belong to the same tenant.

Name resolution of non-Unify Phone users

By default, Unify Phone can only resolve phone numbers that belong to Unify Phone users. If you need to resolve names of non-Unify Phone users, you must

integrate with external services. The following external services are supported for name resolution:

Microsoft Exchange

Name resolution in Microsoft Exchange is only possible for private contacts. After connecting to Microsoft Exchange (Online or on-premises) for the first time, it might take a while for the name resolution to work.

Google Contacts

Unify Phone can resolve your private Google Contacts. After connecting to your Google account for the first time, it might take a while for the name resolution to work.

OpenScape Business

Unify Phone can resolve contacts in the following OpenScape Business directories:

- Personal directory
- Internal directory
- External directory
- Speed Dials

NOTICE: This is available with OpenScape Business V3R3 FR1 or higher.

Persistence of resolved phone numbers in the call history

If call history entries items are resolved to Unify Phone users, this information is persistent across clients and client sessions (sign ins / sign outs).

If a call history item could not be resolved to a Unify Phone user, the clients will attempt to resolve it through the external services. However, this information is not persistent. This means that different clients may display the same call history entries differently, depending on which external service was used to resolve them.

5 Call history

Call history is the list of all your incoming and outgoing calls. You can use it to call your contacts again or to respond to a missed call.




To view the call history, select  **History** from the left menu of the app.

The following tabs are available in call history:

- The **All** tab displays the list of all your incoming and outgoing calls.
- The **Missed** tab displays only the list of all incoming calls that were not answered.

Identification of calls

The entries in the call history are identified as follows:

Symbol	Description
	Incoming call, not missed
	Incoming call, missed
	Outgoing call

New calls in the call history are indicated by a vertical red line to the left of the call entry.

Call details

Further information about calls is listed in the call history:



- Avatar of the caller/ callee
 - Phone number of the caller/ callee
 - Name of the caller/ callee
- The name is only displayed when it can be resolved (e.g. from contacts)
- Call type
 - Date and time of the call
 - Call duration (only for the answered calls)

Currently, if you are signed out of all Unify Phone clients, any incoming or outgoing call on your work number will not appear on the Unify Phone call history. This does not apply to OpenScape Business V3R3 FR1 or higher.

5.1 Deleting the call history

If you want to delete your full call history, follow the steps below:



Step by Step

- 1) Select  **History** from the left menu of the app.
- 2) Select **All** or **Missed**.
- 3) Click  on the top of the call history view.
- 4) Click **Yes** to confirm that you want to delete the call history.

5.2 Deleting an entry from the call history

If you want to delete a call entry from the call history, follow the steps below:

Step by Step

- 1) Select  **History** from the left menu of the app.
- 2) Select **All** to view all calls or **Missed** to view only the calls you didn't answer.
- 3) Hover over the call entry you want to delete and click  to the right of the entry.
- 4) Click **Yes** to confirm that you want the call entry.


Voicemail

Listening to voice messages

6 Voicemail


You can access voicemail messages via Unify Phone.

6.1 Listening to voice messages

When voicemail is enabled for you on your OpenScape system, the voicemail icon  appears at the top right of your Unify Phone app, next to your avatar image. The icon appears with a red dot when you receive a new voice message.

To listen to your voice messages:

Step by Step

- 1) Click the voicemail icon at the top of the app to call your voicemail box.
- 2) If prompted, enter the number of the voicemail box.
- 3) Listen to messages received.
- 4) End the call by clicking .

7 Presence

Your presence status lets people know if you are available for communication or not.

You can also set a profile picture to be identified easily by other users.

7.1 Presence in Unify Phone for Unify Video

The presence or availability statuses in Unify Phone for Unify Video are described in the following table:

Presence / Availability status	Description	How this status gets set
✓ Available	You are online and available to contact.	It is set automatically based on your activity or you can set your status to Available anytime you want.
● On a call	You are online and on a call (either phone call or Unify Video call) or in a Unify Video meeting.	It is set automatically when you are on a phone call or in a meeting.
⊖ Do not disturb	You do not want to be disrupted. Any incoming calls will be silent.	You can set your status to Do not disturb anytime you want.
⊗ Offline	You are offline or inactive (for 15 minutes or more), or logged out of the app.	It is set automatically based on your activity.
⊗ Invisible	You want to appear as if you were offline.	You can set your status to Invisible anytime you want.

Your present status in Unify Phone is synchronized with your presence status in Unify Video and OpenScape communication system. This means, for example, that when you are on a call on your desk phone or in Unify Phone or when you join a meeting in Unify Video, your presence status will change to **On a call** (Busy) on all clients and devices: Unify Phone, Unify Video and desk phone.






7.2 Presence in Unify Phone for OpenScape

The presence or availability statuses in Unify Phone for OpenScape are described in the following table:

Presence / Availability status	Description	How this status gets set
✓ Available	You are online and available to contact.	It is set automatically based on your activity or you can set your status to Available anytime you want.

Presence

Setting your presence status

Presence / Availability status	Description	How this status gets set
 Busy / On a call	You are online and on a call or you are busy and do not want to be interrupted.	It is set automatically when you are on a phone call. You can also set your presence to this anytime you want. If you manually set it to Busy , it will stay that way until you change it again.
 Do not disturb	You do not want to be disrupted. Any incoming calls will be silent.	You can set your status to Do not disturb anytime you want.
 Away	You are away or you want it to appear to others that you are currently away.	It is set automatically when there is no interaction with Unify Phone for a specified period of time and there is no call in progress. On a mobile device, your presence status is set automatically to Away when push notifications cannot be delivered to your Unify Phone app. You can also set your presence to this anytime you want. If you manually set it to Away , it will stay that way until you change it again or until you are logged out of the app.
 Offline	You are offline or logged out of the app.	It is automatically set when you are not logged in on any of your devices.
 Appear offline	You want it to appear to others that you are currently offline.	You can set your presence to this anytime you want. If you manually set it to Appear offline , it will stay that way until you change it again.

7.3 Setting your presence status

You can see your presence status in the top-right corner of the Unify Phone app, on the bottom-right corner of your avatar image.

You can see your presence status in the top right corner of the Unify Phone app, under your avatar and name.



To set your presence status:

Step by Step

- 1) Click on your profile picture at the top right of the app and locate your presence status below your name.

- 2) Click the downward arrow to the right of your presence status and select one of the presence statuses from the list of options.

- The following presence statuses are available on Unify Phone for Unify Video:
 - Available
 - Do not disturb
 - Invisible

NOTICE: If you are on a call, the available options are On a call, Do not disturb, and Invisible.

- The following presence statuses are available on Unify Phone for OpenScape:
 - Available
 - Busy
 - Do not disturb
 - Away
 - Appear offline

NOTICE: If you do not see your presence status or the presence status of others, this would mean that your tenant has been configured to hide presence statuses.

7.4 Setting a profile picture

You can set a profile picture on your account to let other users recognize you easier.

Your profile picture is shown in the top-right corner of the Unify Phone app. By default, before setting a profile picture, your initials are displayed in the avatar space.

You can set your profile picture in one of the following ways:

- Upload a picture from your computer
- Take a picture using your device camera


Step by Step

- 1) Click your profile picture at the top right of the app.
- 2) On the drop-down that appears, click the avatar area.

Presence

Removing the profile picture

3) In the **Change profile picture** window, do one of the following:

- Click on the box to select and upload a picture from your computer.
- Drag and drop a picture into the box.
- Click  below the box to take a picture with your device's camera.

NOTICE: You can take up to four pictures, then select the one you want to use.

The following image types are supported: .jpeg, .png, .bmp, .gif. An error message is displayed when uploading an unsupported image type.

It is recommended to use high quality images for the profile picture. When uploading low quality images, a warning message is displayed suggesting to choose a better one.

4) Adjust the picture by cropping or rotating it.

NOTICE: This option is not available when taking a picture with your device's camera.


5) Click **Save**.

Your profile picture is updated.

7.5 Removing the profile picture

You can remove the profile picture you have previously set and restore the default picture with your initials.

Step by Step

- 1) Click on your profile picture at the top right of the app.
- 2) On the drop-down that appears, click the avatar area.
A pop-up window is displayed and you can see your current profile picture.
- 3) In the **Change profile picture** window, click  in the top-left corner of the avatar area.
- 4) Click **Save**.

Your profile picture is updated to the default one with your initials.

It is not possible to reuse previous profile pictures. You need to upload or take a new image when you want to set your profile picture again.

8 Contact directories

Unify Phone supports the following contacts directories:

- **Internal directory**

Contains Unify Phone users that belong to the same tenant.

- **Exchange contacts directory**

Contains private and global contacts from your Microsoft Exchange accounts (Online or on-premises), as well as in your organization's users directory.

The Exchange contacts directory can be used once you connect to your company's Microsoft Exchange accounts.

For more information, see:

- [Connecting to your Microsoft Exchange Online account](#) on page 41
- [Connecting to your Microsoft Exchange on-premises account](#) on page 41

- **Google contacts directory**

Contains contacts from your Google account.

The Google Contacts directory can be used once you connect to your Google account.

For more information, see [Connecting to your Google account](#) on page 42.

- **OpenScape Business contacts directories**

Contains contacts from the following OpenScape Business directories:

- Personal directory
- Internal directory
- External directory
- Speed Dials.

NOTICE: This is available with OpenScape Business V3R3 FR1 or higher.

8.1 Searching for a contact

You can search for a contact by name or phone number.


As you type in the search box, Unify Phone will simultaneously search in all contact directories it has access to.


If you are connected to your company's Microsoft Exchange account (Online or on-premises) or Google account and you are searching for a contact by name, Unify Phone will search in your private and global Exchange/Google contacts.

If you are connected to your company's Microsoft Exchange account (Online or on-premises) or Google account and you are searching for a contact by phone number, Unify Phone will search in your private Exchange/Google contacts.

Step by Step

- 1) Open Unify Phone.





- 2) Click  **Keypad** on the left menu of the Unify Phone app.
- 3) Search for a contact in one of the following ways:
 - Enter the name or number of the contact you are searching for in the search field.

Click  or press `Enter` to search for a contact.
 - Use the on-screen keypad to enter the number of the contact you are searching for.

Press `Enter` to search for a contact.

The search results display the list of contacts that matches your search (if any).

You can recognize the contacts by the icons displayed at the top right corner of their avatar:

- , for contacts in your Microsoft Exchange Online account, as well as in your organization's users directory.
- , for contacts in your Microsoft Exchange on-premises account.
- , for contacts in your Google account.
- , for contacts in your OpenScape Business directories.

If an OpenScape Business contact has multiple phone numbers associated with it, Unify Phone will display all phone numbers for that contact.

Next steps

You can also view details of a contact's availability in the search results list. For this, locate the desired contact in search results and check their availability in one of the following ways:

- View contact's presence status, in the bottom left corner of their avatar.
- Hover over contact's avatar to display their availability status text.

NOTICE: You can only view details about the availability of Unify Phone users that belong to the same tenant.

If the contact is available, you can click a contact in the search results list to make a call. The call is made using the device you last selected in the Keypad area.

8.2 Contact profile

A contact profile stores personal information such as profile picture, name, phone number and email address.

Each contact has a profile that allows you to access all their available information and perform quick actions such as calling the contact or marking their phone number as a favorite. You can view a contact's profile by clicking on their profile picture.

8.2.1 Viewing a contact's profile

You can view a contact profile page in one of the following ways:

Procedure

- From the contact search results:
 - a) Select **Keypad** from the left menu.
 - b) Search for the contact's name or phone number.
 - c) Click on the contact's profile picture in the search results.
- From the call history:
 - a) Select **History** from the left menu.
 - b) Click on the contact's profile picture in the call history.

Favorites

Marking a contact's phone number as a favorite

9 Favorites

Favorites allow you to easily access contacts you communicate with frequently. You can set a contact's phone number as a favorite for quick access to dial.

9.1 Marking a contact's phone number as a favorite

You can easily mark a contact's phone number as a favorite from the contact's profile page.

Step by Step

- 1) Go to the profile page of the contact you want to add to favorites in one of the following ways:
 - Select **Keypad** from the left menu, search for the contact's name or phone number, then click on the contact's profile picture in the search results.
 - Select **History** from the left menu, click on the profile picture of the contact in the call history.
- 2) Click ☆ to the right of contact's phone number.

The contact's phone number is added to your favorites list.

9.2 Reordering favorites

By default, the favorites list is updated automatically when you mark a contact's phone number as a favorite. The phone number you favorited last appears as the last item in the list.

You can easily rearrange your favorites in the order you want.

Step by Step

- 1) Select ☆ **Favorites** from the left menu.
- 2) Click ⇄ at the top right.
- 3) Drag and drop your favorites in the order you want them to appear.
- 4) Click ✓ at the top right to save the changes.




Your favorites list is updated and displays favorites in the order you arranged.

9.3 Removing a favorite

You can easily remove a favorite by following the steps below:

Step by Step

- 1) Select ☆ **Favorites** from the left menu.

- 2) Click  at the top right.
- 3) Click  to the left of the favorite you want to remove.
- 4) Click  at the top right to save the changes.

You can alternatively remove a favorite by opening the contact's profile page and clicking the star icon.

The phone number is removed from your favorites list.

Next steps

If you want to add the phone number back to your favorites list, you need to mark it again as a favorite.

10 Settings

Use the Settings menu to configure the Unify Phone settings.

To open the **Settings** menu, click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.

- Use the **General** tab to:
 - Change the **Language** in which the program is displayed.
 - Connect to your **Microsoft Exchange** account (Online or on-premises) to access contacts.
 - Connect to your **Google** account to access contacts.
 - Install the **Unify Phone PWA**.
 - Install the Unify Phone Chrome or Edge extension, depending on your browser.
 - Use the **Telephony** tab to:
 - Enable or disable **Call forwarding**.
 - Specify an **Alternative number**.
 - Define the **Call routing**.
 - Download your **Call history**.
 - Use the **Audio** tab to:
 - Configure the Audio/ Ringing output and your microphone.
 - Select a ringtone for incoming calls.
 - Enable **Headset integration** for headsets and external audio devices.
 - Enable or disable automatic gain control for your microphone.
 - Enable or disable echo cancellation for your audio.
 - Use the **Account** tab to:
 - View the time of the last successful login.
 - Change your password.
- This is only available on Unify Phone for OpenScape.

10.1 Changing the language settings

Unify Phone currently supports the following languages: English, German, French, Spanish, Italian, Dutch, Catalan, Portuguese (Brazil) and Basque.

You can set your preferred language for your Unify Phone web app at any time.


Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) In the **Language** section of the **General** tab, select the language you want to use.

The language will change automatically to the one that you have selected.

10.2 Connecting to your Microsoft Exchange Online account

You can connect to your company's Microsoft Exchange Online account to use your private and global Exchange contacts for phone calls.

Exchange contacts are shown with the Microsoft Exchange Online icon () at the top right corner of their avatar.

Prerequisites

A Microsoft Tenant administrator from your company must grant admin consent for the Unify Phone app on their tenant.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Locate the Microsoft Exchange Online extension, and click **Connect**.
- 3) When prompted, sign in to your Microsoft Exchange Online account.

According to your connection status, the button in the Microsoft Exchange Online area displays:

- **Connect**, when you are not connected to Microsoft Exchange Online.
- **Disconnect**, when you are connected to Microsoft Exchange Online.

Once you successfully connect to Microsoft Exchange Online, your account is shown below the **Disconnect** button.


Next steps

You can disconnect from your Microsoft Exchange Online account at any time by clicking **Disconnect**, and then, on the pop-up window, selecting the account you want to sign out from.

If your favorites list includes phone numbers of Microsoft Exchange Online contacts, upon disconnecting, you will be prompted to choose whether to delete or keep these favorite phone numbers. If you choose to delete them, they will be deleted from your favorites list on all Unify Phone clients. If you choose to keep them, they will remain on Unify Phone. You can always delete favorites manually later.

10.3 Connecting to your Microsoft Exchange on-premises account

You can connect to your company's Microsoft Exchange on-premises account to use your private and global Exchange contacts for phone calls.

Exchange contacts are shown with the Microsoft Exchange on-premises icon () at the top right corner of their avatar.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Locate the Microsoft Exchange on-premises extension, and click **Connect**.

Settings

Connecting to your Google account

3) On the pop-up window, enter your account's information:

- Enter your Microsoft Exchange username in the form of `username@domain` in the **Exchange username** field.
- Enter your password in the **Exchange password** field.
- Enter your service URL in the **Exchange web service URL** field.

The service URL must start with `https://`.

All fields are mandatory and cannot be omitted.

4) Click **Connect** on the pop-up window.

According to your connection status, the button in the Microsoft Exchange on-premises area displays:

- **Connect**, when you are not connected to Microsoft Exchange on-premises.
- **Disconnect**, when you are connected to Microsoft Exchange on-premises.

Once you successfully connect to Microsoft Exchange on-premises, your account is shown below the **Disconnect** button.

If you have previously connected to a Microsoft Exchange on-premises account, Unify Phone remembers the username and service URL you have used and automatically fills them in. Your Exchange password is not remembered and you must enter it again every time you connect to Microsoft Exchange on-premises.

Connecting to your Exchange account will automatically grant full mailbox access to Unify Phone.

Next steps

You can disconnect from your Microsoft Exchange on-premises account at any time by clicking **Disconnect**.

If your favorites list includes phone numbers of Microsoft Exchange on-premises contacts, upon disconnecting, you will be prompted to choose whether to delete or keep these favorite phone numbers. If you choose to delete them, they will be deleted from your favorites list on all Unify Phone clients. If you choose to keep them, they will remain on Unify Phone. You can always delete favorites manually later.

10.4 Connecting to your Google account

You can connect to your Google account and use your Google contacts for phone calls.

Google contacts are shown with the Google icon () at the top right corner of their avatar.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Locate the Google Contacts extension, and click **Connect**.
- 3) When prompted, sign in to your Google account.

According to your connection status, the button in the Google Contacts area displays:

- **Connect**, when you are not connected to your Google account.
- **Disconnect**, when you are connected to your Google account.

Once you successfully connect to Google, your account is shown below the **Disconnect** button.

Next steps

You can disconnect from your Google account at any time by clicking **Disconnect**, and then, on the pop-up window, selecting the account you want to sign out from.

If your favorites list includes phone numbers of Google contacts, upon disconnecting, you will be prompted to choose whether to delete or keep these favorite phone numbers. If you choose to delete them, they will be deleted from your favorites list on all Unify Phone clients. If you choose to keep them, they will remain on Unify Phone. You can always delete favorites manually later.

10.5 Installing the Unify Phone Edge extension

You can install the Unify Phone Edge extension to keep Unify Phone in the same browser tab, when it is launched from another app.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **General** tab.
- 3) Locate the **Unify Phone Edge extension** section.
- 4) Click **Install**.
- 5) The **Edge Add-ons** page opens in the Microsoft Edge browser. Click **Get** to install the Unify Phone Edge extension.

After the installation, the Unify Phone Edge extension is available in browser's extensions list.

If you have the Unify Phone PWA running and try to open Unify Phone in Microsoft Edge, the Unify Phone PWA will be automatically closed.

If Unify Phone is open in Microsoft Edge, and you try to open the Unify Phone PWA from your computer's start menu, the Unify Phone web client will be automatically closed.

10.6 Installing the Unify Phone Chrome extension

You can install Unify Phone Chrome extension to keep Unify Phone in the same browser tab, when it is launched from another app.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.

Settings

Enabling call forwarding

- 2) Select the **General** tab.
- 3) Locate the **Unify Phone Chrome extension** section.
- 4) Click **Install**.
- 5) The **Chrome web store** page opens in the Chrome browser. Click **Add to Chrome** to install the Unify Phone Edge extension.
- 6) Confirm the installation by clicking **Add extension**.

After the installation, the Unify Phone Chrome extension is available in browser's extensions list.

If you have the Unify Phone PWA running, and try to open Unify Phone in Google Chrome, the Unify Phone PWA will be automatically closed.

If Unify Phone is open in Google Chrome, and try to open the Unify Phone PWA from your computer's start menu, the Unify Phone web client will be automatically closed.

10.7 Enabling call forwarding

You can redirect your phone calls to a person of your choice or to voicemail when you are out of office or unavailable by using **Call forwarding**.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Telephony** tab.
- 3) Switch the **Call forwarding** slider to ON (blue) to enable call forwarding.
- 4) Select one of the available options:
 - a) If you want to forward your phone calls to a colleague, select the **Number** option and enter your colleague's phone number.
 - b) If you want to forward your calls to the voicemail, select the **Voicemail** option.

When you enable call forwarding, the call forwarding icon (📞) is shown in the upper right corner of the Unify Phone app.

10.8 Disabling call forwarding

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Telephony** tab.
- 3) Switch the **Call forwarding** slider to OFF (grey) to disable call forwarding.

Alternatively, you can click 📞 in the upper right corner of the Unify Phone app and select **Disable**.

10.9 Setting an alternative number

You can set the phone number of an alternative device, e.g. mobile, that can be used for making and receiving phone calls through your work number. You also use the alternative number to control the routing of your calls between your devices.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Telephony** tab.
- 3) Switch the **Alternative number** slider to ON (blue).
- 4) Type the phone number of an alternative device in the input field or select one from the suggestions list.

The list displays the most recently set alternative numbers (up to 5) and is updated as you type in.

You can remove an alternative number from the suggestions list by clicking the **X** button next to it. The phone number will be added back to the suggestions list if you add it again as your alternative number.

10.10 Configuring incoming call routing

By default, incoming phone calls will ring on all of your Unify Phone clients and desk phone. On no answer they will be routed to your alternative device, if you have specified one.

You can change this default setting and have all incoming phone calls be routed directly to your desk phone or alternative device, if you know, for example, that you will be on this phone for a certain period of time.

Follow the steps listed below to configure **Call routing**:

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Telephony** tab.
- 3) Under the **Call routing** section, choose one of the following options:

- **Default routing**

Incoming calls will ring on all your Unify Phone clients and desk phone. On no answer, they will be routed to your alternative device, if you have

Settings

Downloading the call history

specified one. Outgoing calls will be possible via all your Unify Phone clients or desk phone.

- **Desk phone**

Incoming calls will be routed directly to your desk phone. Outgoing calls will be possible via all your Unify Phone clients or desk phone.

- **Unify Phone**

Incoming calls will be routed directly to your Unify Phone clients. Outgoing calls will be possible via all your Unify Phone clients or desk phone.

- **Alternative number**

Incoming calls will be routed directly to your alternative device. Outgoing calls will be possible via all your Unify Phone clients or desk phone.

NOTICE: This option is available only if you have specified an alternative number.

10.11 Downloading the call history

You can download the call history associated with your Unify Phone account.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Telephony** tab.
- 3) Locate the **Call history** section.
- 4) Click **Download**.

10.12 Configuring the audio devices

All sounds that come from Unify Phone by default go through the audio device as configured on your computer.

You can select the desired devices for audio output, ringing output and microphone.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Under **Audio output**, choose the device you want to use for calls in Unify Phone (e.g., your headset).
- 4) Under **Ringing output**, choose the device you want to play back ring tones from Unify Phone (e.g., your speakers).
- 5) Under **Microphone**, choose the device you want to use for calls in Unify Phone (e.g., your headset).

NOTICE:

The **Audio output** and **Ringling output** options are available in Chrome and Edge browsers and the PWA.



10.13 Changing the Unify Phone ringtone for incoming calls

You can change the ringtone for incoming calls to easily recognize calls that come in on your Unify Phone app.

Before changing the ringtone, the **Default** one is used.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **Ringtones** section and click the down arrow next to it.
- 4) Select one of the available ringtones from the drop-down list.
- 5) Click any ringtone from the list to play it or select it as the ringtone for incoming calls.

The ringtone is selected and a preview plays so you can hear what it sounds like. To stop the playback click the  icon. To replay the ringtone, click the  icon.

The ringtone for incoming calls on your Unify Phone app is updated.

10.14 Enabling or Disabling Automatic Gain Control

You can improve the audio experience during calls via the **Automatic Gain Control** (AGC) option. It allows to automatically adjust the sensitivity of your microphone based on the volume of the input it is receiving.

If you are placing a call from a noisy environment where there is background noise (e.g. other people speaking), enabling **Automatic Gain Control** can amplify background sounds when your microphone is unmuted. If you work in such environment, you may turn off this feature. You can do this in the **Audio** tab of your Unify Phone client.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Under **Automatic Gain Control** tick or un-tick the **Turn on automatic gain control** checkbox according to your preference.

10.15 Enabling or Disabling Echo Cancellation

You can improve the overall quality of a calls via the **Echo Cancellation** option. It removes echo caused by your microphone picking up your speaker's output.

If you are placing a call from a noisy environment where there is background noise (e.g. other people speaking) and you do not have a headset, enabling **Echo Cancellation** can cause poor audio quality or no audio at all for the first few seconds of the call. If you work in such environment, you may turn off this feature. You can do this in the **Audio** tab of your Unify Phone client.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Under **Echo Cancellation** tick or un-tick the **Turn on echo cancellation** checkbox according to your preference.

10.16 Headset integration

You can control Unify Phone calls directly from a range of headsets, handsets and external audio devices.

You can answer, mute, unmute or end a call through your device's control buttons.

The following vendors are currently supported:

- Jabra
<https://partnerdialog.unify.com/index.php/partner/Jabra>
- Poly
<https://partnerdialog.unify.com/index.php/partner/poly>
- Yealink
<https://partnerdialog.unify.com/index.php/partner/YEALINK>
- EPOS
<https://partnerdialog.unify.com/index.php/partner/EPOS>
- VT

NOTICE: Headset integrations for Jabra and Poly are only available in Chrome and Edge browsers and the PWA.

10.16.1 Jabra devices

Unify Phone provides call control functionality with a range of Jabra devices. For the list of Jabra devices supported, please refer to <https://partnerdialog.unify.com/index.php/group/30/nodes>.

NOTICE: Call control is supported when you are using the Unify Phone web app with Google Chrome or Microsoft Edge.

NOTICE: If you connect the same Jabra device to two or more softphone applications, this may lead to call issues, e.g., unexpected call drops.

10.16.2 Enabling Jabra headset integration

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **Jabra** section, under **Headset integration**.
- 4) Switch the **Jabra** slider to ON (blue) to enable the Jabra headset integration.
- 5) Click the **Pair device** button and select the Jabra device connected to your computer.

The Jabra device is connected to Unify Phone.

If no Jabra devices are connected or paired, the message "No device connected or paired" is displayed in the **Jabra** section and the **Pair device** button is displayed.

The first Jabra device connected to your computer is selected automatically.

10.16.3 Poly devices

Unify Phone provides call control functionality with a range of Poly devices. For the list of Poly devices supported, please refer to <https://partnerdialog.unify.com/index.php/group/43/nodes>.

NOTICE: Call control is supported when you are using the Unify Phone web app with Google Chrome or Microsoft Edge.

10.16.4 Enabling Poly headset integration

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **Poly** section, under **Headset integration**.
- 4) To enable the Poly headset integration switch the **Poly** slider to ON (blue).
- 5) Click on **Plantronics Hub**.
- 6) You will be redirected to the Plantronics web site.

- 7) Download the Plantronics Hub software by clicking on **Windows** or **Mac**, according the operating system you are using.
- 8) Install the Plantronics Hub software on your computer:
 - a) On Windows operating system run the `PlantronicsHubInstaller.exe` file.
 - b) On Mac operating system run the `PlantronicsHubInstaller.dmg` file.
- 9) When the installation of the Plantronics Hub software is completed, navigate back to **Unify Phone > Settings > Audio > Poly** and click **Connect**.

You can manage your Poly devices through the Plantronics Hub software that is downloaded locally to your computer.

If no Poly devices are connected to your computer, the message "No Poly headset found" is displayed in the **Poly** section.

10.16.5 Enabling Yealink headset integration

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **Yealink** section, under **Headset integration**.
- 4) Switch the **Yealink** slider to ON (blue) to enable the Yealink headset integration.

If no Yealink devices are connected, the message "No device connected" is displayed in the **Yealink** section.

If one or more Yealink devices are connected, but no device is selected as the audio device, the message "No device selected" is displayed in the **Yealink** section and the **Select device** button is displayed.

- 5) Connect an Yealink device and click **Select device**.
A pop-up window displaying the list of connected Yealink devices appears.
- 6) On the pop-up window, select the Yealink device you want to use and click **Connect**.
When connecting a Yealink device for the first time, you must pair the device with your computer.
- 7) Click **Pair device**.
A pop-up window opens in your browser, displaying the selected Yealink device.
- 8) On the pop-up window, select the Yealink device you want to pair and click **Connect**.

The Yealink device is connected and paired with Unify Phone.

10.16.6 Yealink devices

Unify Phone provides call control functionality with a range of Yealink devices. For the list of Yealink devices supported, please refer to <https://partnerdialog.unify.com/index.php/group/97/nodes>.

NOTICE: Call control is supported when you are using the Unify Phone web app with Google Chrome or Microsoft Edge.

NOTICE: If you connect the same Yealink device to two or more softphone applications, this may lead to call issues, e.g., unexpected call drops.

10.16.7 Enabling EPOS headset integration

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **EPOS** section, under **Headset integration**.
- 4) To enable the EPOS headset integration switch the **EPOS** slider to ON (blue).
If the EPOS Connect software is not already installed, a message will be displayed in the EPOS section prompting you to install it.
- 5) Click on **EPOS Connect**.
You will be redirected to the EPOS web site.
- 6) Download the EPOS Connect software for **Windows** or **Mac**, according to the operating system you are using.
- 7) Install the EPOS Connect software on your computer.
- 8) When the installation of the EPOS Connect software is completed, navigate back to **Unify Phone > Settings > Audio > EPOS**.
If no EPOS devices are connected, the message "No device connected" is displayed in the **EPOS** section.
If one or more EPOS devices are connected, but no device is selected as the audio device, the message "No device selected" is displayed in the **EPOS** section and the **Select device** button is displayed.
- 9) Connect an EPOS device and click **Select device**.
A pop-up window with the list of audio devices appears.
- 10) Select the EPOS device you want to use.

The EPOS device is connected to Unify Phone.

You can manage your EPOS devices through the EPOS Connect software that is downloaded locally to your computer.

Settings

Viewing your account's activity

10.16.8 EPOS devices

Unify Phone provides call control functionality with a range of EPOS devices. For the list of EPOS devices supported, please refer to <https://partnerdialog.unify.com/index.php/group/18/nodes>.

NOTICE: Call control is supported when you are using the Unify Phone web app with Google Chrome or Microsoft Edge.

10.16.9 Enabling VT headset integration

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Audio** tab.
- 3) Locate the **VT** section, under **Headset integration**.
- 4) Switch the **VT** slider to ON (blue) to enable the VT headset integration.

If no VT devices are connected, the message "No device connected" is displayed in the **VT** section.

If one or more VT devices are connected, but no device is selected as the audio device, the message "No device selected" is displayed in the **VT** section and the **Select device** button is displayed.

- 5) Connect a VT device and click **Select device**.

A pop-up window displaying the list of connected VT devices appears.

- 6) On the pop-up window, select the VT device you want to use and click **Connect**.

When connecting a VT device for the first time, you must pair the device with your computer.

- 7) Click **Pair device**.

A pop-up window opens in your browser, displaying the selected VT device.

- 8) On the pop-up window, select the VT device you want to pair and click **Connect**.

The VT device is connected and paired with Unify Phone.

10.17 Viewing your account's activity

You can view the time of the last successful authentication to Unify Phone and track your account's activity.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Account** tab.

- 3) Locate the **Activity** section.

The date and time of the last successful sign-in are displayed.

10.18 Changing your password

You can change your password any time you are signed in to Unify Phone for OpenScape.

Prerequisites

You are signed in with your Unify Phone credentials.

NOTICE: If you are signed in through SSO, you cannot change your password by following the steps outlined below; you need to change your password outside of the Unify Phone app, in the third-party service that provides the SSO.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 2) Select the **Account** tab.
- 3) Click **Change password**.
- 4) Enter your new password in the **Password** field, then enter it again in the **Confirm new password** field.

The password must conform to the password requirements displayed.

As you type in, a visual strength indicator shows how secure your password is.

For security reasons, you cannot reuse a few passwords that you have previously set on your account. If the new password matches a recent password from the password history cache, an error message is displayed prompting you to choose a different password.

- 5) Click **Submit**.

Your password is changed.

NOTICE: Your password is set to expire automatically every 90 days. You will receive an email reminder 7 days prior to your password expiration date. Remember to check your junk or spam folder if you can't find the email in your inbox.

11 Unify Phone Progressive Web App (PWA)

Unify Phone PWA provides an excellent way to access Unify Phone on your desktop computer without having to open one more browser tabs or window. It supports all the features of Unify Phone on a browser and more:

- You can pin the app to taskbar for easy access.
- You can create a desktop shortcut.
- You can set the app to launch automatically when your system starts.

Unify Phone PWA is supported on Google Chrome and Microsoft Edge browsers.

11.1 Installing Unify Phone as PWA

You can install Unify Phone as a Progressive Web App through:

- The Unify Phone's **Settings** menu, when Unify Phone is open on your Google Chrome or Microsoft Edge browser
- The Google Chrome address bar
- The Microsoft Edge address bar

11.1.1 Installing Unify Phone as PWA via Settings

You can install Unify Phone as PWA from the web client's **Settings** menu.

Step by Step

- 1) Open Unify Phone on Google Chrome or Microsoft Edge.
- 2) Click on your profile picture at the top right of the app and select **Settings** from the drop-down menu.
- 3) Select the **General** tab.
- 4) Locate the **Unify Phone Progressive Web App (PWA)** section.
- 5) Click **Install**.
- 6) Confirm the installation by clicking **Install**.


The browser tab with the Unify Phone closes and the Unify Phone PWA is displayed.

Unify Phone is listed in your computer's start menu.

11.1.2 Installing Unify Phone as PWA via Chrome

You can install Unify Phone as PWA from the Google Chrome address bar.

Step by Step

- 1) On your computer, open Google Chrome.
- 2) Open Unify Phone.
- 3) Click  at the top right of the address bar.
- 4) Follow the onscreen instructions to install the PWA.


The browser tab with the Unify Phone web client closes and the Unify Phone PWA is displayed.

Unify Phone is listed in your computer's start menu.

11.1.3 Installing Unify Phone as PWA via Microsoft Edge

You can install Unify Phone as PWA from the Microsoft Edge address bar.

Step by Step

- 1) On your computer, open Microsoft Edge.
- 2) Open Unify Phone.
- 3) Click  at the top right of the address bar.
- 4) Follow the onscreen instructions to install the PWA.

The browser tab with the Unify Phone web client closes and the Unify Phone PWA is displayed.

After the installation finishes, you can give the following permissions to Unify Phone Progressive Web App:

- Pin to taskbar
- Pin to Window's start menu
- Create a Desktop shortcut
- Auto-start on device login

11.2 Configuring the Unify Office PWA to auto start

You can configure the Unify Phone PWA to launch automatically when your system starts.

Prerequisites

Install the Unify Phone extension for Google Chrome or Microsoft Edge:

- [Installing the Unify Phone Chrome extension](#) on page 43
- [Installing the Unify Phone Edge extension](#) on page 43

Step by Step

- 1) Open Google Chrome or Microsoft Edge on your computer.
- 2) Open the **Apps** view on your browser:
 - On Chrome type `chrome://apps` in the address bar and press **Enter**.
 - On Edge type `edge://apps` in the address bar and press **Enter**.
- 3) Locate the **Unify Phone** app .
- 4) Press the **Ctrl** key on your keyboard and right-click on the **Unify Phone** app.
- 5) Select **Start app when you sign in**.

11.3 Making phone calls via telephone links with the Unify Phone PWA

With the Unify Phone PWA, you can easily make phone calls when you click on a URL with the tel scheme, i.e. a telephone link, or when you enter `tel:` followed by the phone number of the person you want to call in your browser's address bar (Chrome or Edge).

Making phone calls via telephone links with the Unify Phone PWA is supported on Windows and Mac devices. On Chromebook devices, the Unify Phone PWA cannot open URLs with the tel: scheme.

NOTICE: If you need to open telephone links on a Chromebook, you need to install and use the Unify Phone Android app. The Unify Phone Android app requires your Chromebook to run on Android 11. Android 11 is currently rolling out in the Beta channel of the Chrome OS. Therefore, you need to switch to the Beta channel for your Chromebook to receive the update. For instructions, please refer to section [Switching your Chromebook to Beta channel](#) on page 63.

11.3.1 Making a call from a telephone link on Windows

Step by Step

- 1) To make a call from a telephone link on Windows, do one of the following:
 - Click a telephone link.
 - Open Google Chrome or Microsoft Edge, type `tel:` followed by the phone number you want to call in the address bar and press Enter.
E.g., `tel: +100`
- 2) Choose the app you want to use to make the call by clicking **Pick an app**.
- 3) From the list of available apps, select **Unify Phone**.
- 4) If you want Unify Phone to be the default calling app, make sure the **Always use this app** checkbox is ticked.
- 5) Click **OK**.
- 6) When prompted, click **Allow** to allow the Unify Phone PWA to use telephone links.

11.3.2 Making a call from a telephone link on MacOS

Step by Step

- 1) To make a call from a telephone link on MacOS, do one of the following:
 - Click a telephone link.
 - Open Google Chrome or Microsoft Edge, type `tel:` followed by the phone number you want to call in the address bar and press Enter.
E.g., `tel: +100`

- 2) Configure your system to make calls using Unify Phone PWA:
 - a) Open the **FaceTime** app.
 - a) Open the **Preferences** menu.
 - a) In the **Default for calls** section, select **Unify Phone**.
- 3) Choose the app you want to use to make the call by clicking **Pick an app**.
- 4) From the list of available apps, select **Unify Phone** and click **OK**.
- 5) When prompted, click **Allow** to allow the Unify Phone PWA to use telephone links.

After the first time you use the Unify Phone PWA to make a call from a telephone link, the app will open as the default calling app.

11.4 Making Unify Phone PWA the default app for the Tel protocol on Windows

When you open a telephone link to make a call, you can set the Unify Phone PWA as the default calling app (for more details, please refer to: [Making a call from a telephone link on Windows](#) on page 56).

You can alternatively set Unify Phone PWA as the default app for the Tel protocol on Windows from your operating system settings.

Step by Step

- 1) On your computer, go to **Start > Settings > Apps > Default apps**.
- 2) Click **Choose default apps by protocol**.
- 3) Locate the **Tel (URL:tel)** protocol in the list, click the **+** icon next to it and select the **Unify Phone** PWA.

Notifications

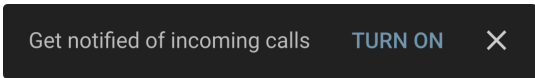
Allow notifications from Unify Phone web client in Chrome

12 Notifications

The Unify Phone web client and PWA can send you browser notifications for incoming calls. These notifications pop up on your desktop when a new call arrives allowing you to click back to Unify Phone to take the call.

If you are using Unify Phone on a browser, you can get notified of incoming calls even when your browser is minimized or a different tab is currently selected. If you are using the Unify Phone PWA, you can get notified of incoming calls even when the app window is minimized or not on focus.

The easiest way to turn on notifications is to accept them when you are prompted the first time, that is when you first sign in to the Unify Phone web client or PWA. The following banner will pop up at the bottom of the app:

A dark grey rectangular banner with rounded corners. On the left, it says "Get notified of incoming calls" in white text. In the center, there is a blue button with the text "TURN ON" in white. On the right, there is a white "X" icon for closing the banner.

Once you select to turn on notifications, your browser will prompt you to allow or deny notifications from the Unify Phone website. Choose to allow them.

If you deny them, Unify Phone will not be allowed to send notifications until you change the setting back to "Allow" in your browser, as described in the following sections.

Additionally, if you have moved away from the Unify Phone web client or PWA, you can get notified about missed calls or new voicemail messages by a badge with a red dot and a counter displayed in the browser tab or PWA icon. The badge appears when a new notification (missed call or voicemail message) is received while you are not using Unify Phone and disappears when you open the app. The counter indicates the number of these notifications.

12.1 Allow notifications from Unify Phone web client in Chrome

You can allow notifications from the Unify Phone web client in Chrome from your browser address bar or from your browser settings.

Allow notifications from your browser address bar

- 1) Open <https://phoneapp.unify.com> in Google Chrome.
- 2) Click on the lock icon in the address bar.
- 3) Select the **Site Settings** option.
- 4) Scroll down to **Notifications**.
- 5) Click the drop-down menu next to it and select **Allow**.

Allow notifications from your browser settings

- 1) Open Chrome and click the three dots in the upper-right corner. Then, select **Settings**.
- 2) Select **Privacy and security** on the left, and then click **Site Settings**.
- 3) Under **Permissions**, select **Notifications**.
- 4) Locate the Unify Phone website, click the three dots next to it and select **Allow**.

12.2 Allow notifications from Unify Phone web client in Edge

You can allow notifications from the Unify Phone web client in Edge from your browser address bar or from your browser settings.

Allow notifications from your browser address bar

- 1) Open <https://phoneapp.unify.com> in Microsoft Edge.
- 2) Click on the lock icon in the address bar.
- 3) Click the drop-down menu next to **Notifications** and select **Allow**.

Allow notifications from your browser settings

- 1) Open Edge and click the three dots in the upper-right corner. Then, select **Settings**.
- 2) Select **Cookies and site permissions** on the left, and then click **Notifications**.
- 3) Under **All permissions**, select **Notifications**.
- 4) Locate the Unify Phone website, click the three dots next to it and select **Allow**.

12.3 Allow notifications from Unify Phone web client in Firefox

You can allow notifications from the Unify Phone web client in Firefox from your browser address bar or from your browser settings.

Allow notifications from your browser address bar

- 1) Open <https://phoneapp.unify.com> in Mozilla Firefox.
- 2) Click on the lock icon in the address bar.
- 3) Click **Connection secure**.
- 4) Click **More information**.
- 5) On the pop-up window, select the **Permissions** tab.
- 6) Under **Send notifications**, un-tick the **Use Default** checkbox, then click **Allow**.
- 7) Close the pop-up window.

Allow notifications from your browser settings

- 1) Open Firefox and click the three-line icon in the upper-right corner. Then, select **Settings**.
- 2) Select **Privacy & Security** on the left.
- 3) Under **Permissions**, click **Settings** next to **Notifications**.
- 4) Locate the Unify Phone website, click the drop-down menu next to it and select **Allow**.
- 5) Click **Save Changes**.

Notifications

Allow notifications from Unify Phone PWA (Chrome app)

12.4 Allow notifications from Unify Phone PWA (Chrome app)

You can allow notifications from the Unify Phone PWA that you have installed through Google Chrome, so that you can get notified of incoming calls.

Step by Step

- 1) Open Google Chrome on your computer.
- 2) Type `chrome://apps/` in the address bar and press `Enter`.
- 3) Locate the **Unify Phone** app, right-click on it and select **Settings**.
- 4) Switch the **Notifications** slider to ON (blue) to enable browser notifications for Unify Phone.

12.5 Allow notifications from Unify Phone PWA (Edge app)

You can allow notifications from the Unify Phone PWA that you have installed through Microsoft Edge, so that you can get notified of incoming calls.

Step by Step

- 1) Open Microsoft Edge on your computer.
- 2) Type `edge://apps/` in the address bar and press `Enter`.
- 3) Locate the **Unify Phone** app and click **Details**.
- 4) Under **Permissions**, click **See permission details for <Unify Phone website>**.
- 5) Click the drop-down menu next to **Notifications** and select **Allow**.

13 Service and support

User documentation

You can access user documentation from the Unify Phone app. For more information, please refer to section [Accessing user documentation](#) on page 61.

Online support is available on the Unify Video website

<https://unify.com/unifyvideo>

This includes:

- Knowledge base - FAQs
- Support portal login

Service requests

If you have an issue or want to give us feedback, please refer to section [Reporting an issue](#) on page 61.

13.1 Accessing user documentation

You can access the following user documentation from the Unify Phone web app:

- Unify Phone for Web, user guide (this document)
- Unify Phone for Android, user guide
- Unify Phone for iOS, user guide.

Documentation is available in the following formats: PDF and HTML.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Help** from the drop-down menu.
- 2) Locate the guide you want to open, then click **Open HTML** or **Open PDF** according to your preference.

13.2 Reporting an issue

If you are experiencing an issue with Unify Phone, you can report it from within the app.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **Report issue** from the drop-down menu.
Your default email client opens with a pre-populated message.

- 2) Provide a short description of the issue in the subject line and a detailed description of the issue in the email body.

When describing the issue, please indicate:

- a) The approximate time the problem happened
- b) How often the issue occurs
- c) What you were doing when the issue occurred
- d) Attach any screenshots that might help troubleshoot the issue
- e) Attach the log files from your Unify Phone client (with name starting with "wcans").

The log files have been downloaded to the default download folder of your computer.

- 3) Click **Send**.

13.3 Viewing the What's New

You can learn about the most important features and changes in Unify Phone from within the Unify Phone app.

Step by Step

- 1) Click on your profile picture at the top right of the app and select **What's new** from the drop-down menu.
- 2) If there are more than one What's new items, click **Next** or **Previous** to navigate through them.

13.4 Viewing the terms and conditions

You can view terms and conditions any time you want from within the Unify Phone app.

Step by Step

Click on your profile picture at the top right of the app and select **About** from the drop-down menu.

14 Appendix

This section contains additional reference information.

14.1 Switching your Chromebook to Beta channel

You can switch your Chromebook to Beta channel by following the steps below:

Step by Step

- 1) Sign in to your Chromebook with the owner account.
- 2) At the bottom right, click the time and then select **Settings > About ChromeOS > Additional details**.
- 3) In the **Channel** area, click **Change channel**, then select the Beta channel.
- 4) Go back to the **About ChromeOS** area and click **Check for updates**.
Your Chromebook downloads and installs the latest Chrome OS beta build.
- 5) Restart your Chromebook to complete the update.
- 6) Go to **Settings > Apps > Manage Android preferences > System > About Device** and check that you are using Android version 11.
- 7) If your Chromebook is based on Hatch and you have not received the Android 11 update in the latest Beta build, remove the existing Android setup and install it again:
 - a) Navigate to **Settings > Apps > Remove Play Store** and select **Remove**.
 - b) Turn on Play Store from the Apps page and install it again.
Installing Play Store again will remove all your Android apps.

